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# Starting Discoverer 4i – Creating a New Workbook

Discoverer 4i can be accessed via the web using Internet Explorer.

- Activate your web browser
- You can access your reports area using these links:
  - o **CONUS**
  - o <u>PACAF</u>
  - o USAFE
- Click on the Discoverer 4i Plus Server 2 (ACES-HM, PM/RP) link to the right, on the web page.
- A Security Alert will pop up. Select "Yes" to continue.



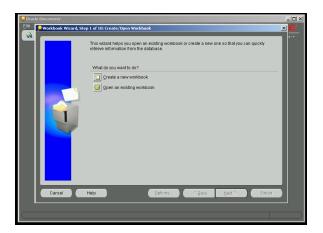
• The Discoverer Start Page will be displayed. Select the "Click to Start" Image to begin



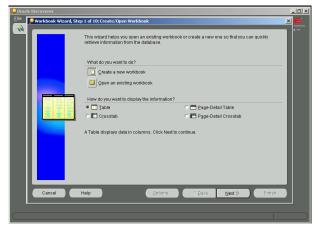
- Enter your ACES-HM logon, password and database
- Click Connect button
  - o It can take some time to log into Discoverer



• Click on the button next to Create New Workbook

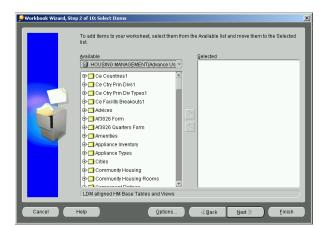


• Click on the button next to Table

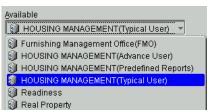


• Click on the Next button on the bottom right of the screen

- The screen will change and it can take some time for the table list to appear
- The screen is divided into two halves, the left side of the screen is titled Available, the right side of the screen is titled Selected, for the report you must get the data fields from the Available side of the screen to the Selected side of the screen

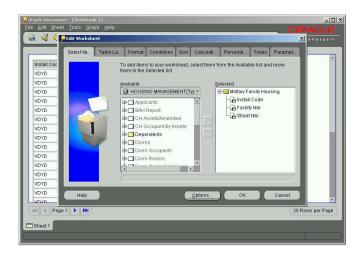


• At the top of the left, Available side, there are the words: Housing Management and in brackets either Advanced User, Typical User, Predefined Reports



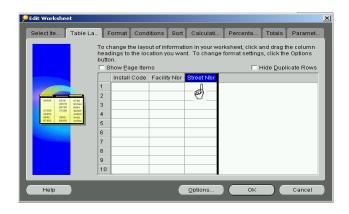
- Click on the down arrow in this field and select either Typical User or Predefined Reports
  - Advanced user contains the raw data tables and you must be familiar with ACES-HM to create reports from this view
- Once a view is selected there will now be a list of folders that can be expanded to view the individual data fields from the database
- Either double click on the Yellow folder or click on the + sign once to the left of the folder
  - Military Family Housing
- This will bring up the data fields from the database contained in this folder
- For a field to come out on the report you must get the field name from the 'Available' white screen on the left to the 'Selected' white screen on the right
- Click on the words of the field name once, it will highlight blue

- Click on the arrow on the vertical gray bar that separates the two screens to move the field to the Selected area
  - o The field desired should now be in the Selected area, you can also click and drag
- Holding down the CTRL (control) key while clicking on the fields in the available list will allow you to select multiple fields and move them over all at one time
- Once you have all the fields you need for your report click on the Finish Button on the bottom right of the screen

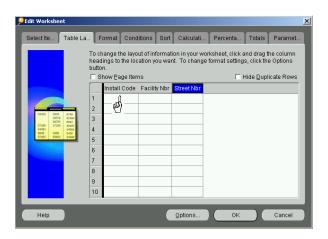


# Changing the Order of the Columns

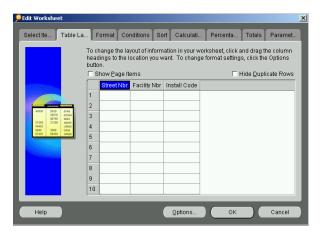
This is when you want to line up the columns in a different order than the default the discoverer report gave you. To access this area, click on Sheet|Table Layout on the menu bar, or the Table Layout icon on the toolbar.



- With the data in your report displayed, click on the top of the column you want to move
  - Click on the column heading
  - o The column will highlight
- With your cursor on the column heading click and hold down the left mouse button
- Drag your cursor either to the right or the left, to where you want to place the column
  - o The cursor will change to a hand

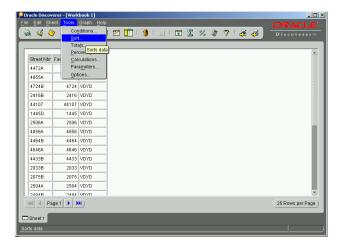


- Let go of the mouse when you have the cursor where you want the column
- Repeat for all the columns you want to move

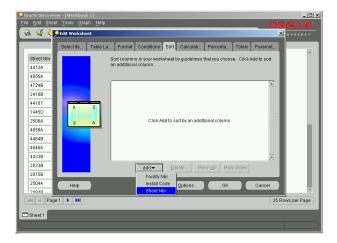


# Sorting the Report

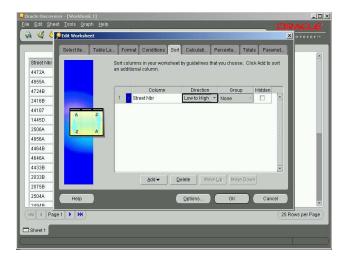
This allows data to be grouped into the order you want.



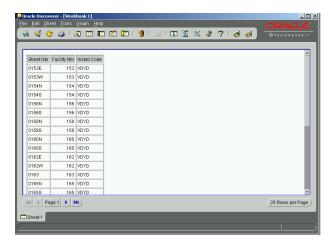
- Click on the word Tools on the menu bar at the top
- Click on the word Sort



- Click on the Add button at the bottom of the pop-up box
- Choose the field you want the report to sort on first
- Click on the Add button again and choose the second field that you want to sort on



- Repeat for all the fields that you want to sort on to get your report into the order you want
- Click on the OK button



### Adding a New Field to a Report

If you create a report and forget a field or want to modify an existing report to add a new field

- Click on the word Sheet on the menu bar at the top of the screen
- Click on Edit Sheet
  - o You will now be returned to the screen to select items
- Either double click on the Yellow folder or click on the + sign once next to the folder to find the field that you want to add to the report
- Click on the arrow on the vertical gray bar that separates the two screens
- The field desired should now be in the Selected area
  - o You can also click and drag
- Click on the OK button at the bottom right of the screen

### Deleting a Field from a Report

- Click on the word Sheet on the menu bar at the top of the screen
- Click on Edit Sheet
- Click on the Table Layout Tab
- Click on the Column title to highlight the column
- Press the Delete key on the keyboard

If you have multiple fields to delete, the report is long, or you are adding fields as well there is an alternate way to delete fields

- Click on the word Sheet on the menu bar at the top if the screen
- Click on Edit Sheet
  - O You will now be returned to the screen to select items
- Click on the Fields that you want to remove from the report in the "Selected" half of the screen
  - O You can hold down the CTRL (control key) to select more than one
- Click on the arrow on the vertical gray bar that separates the two halves of the screen to move them back to the Available half
- The field desired should now not be in the Selected area, you can also click and drag
- Click on the OK button at the bottom right of the screen when finished

#### Adding a Condition

A condition is a set of criteria that filters data in a sheet. You use a condition when you want to limit the amount of data or refine the level of detail in sheet. For example you might only want people with the Rank of E-4 in your report so you would set a condition on the report on Rank = E-4.

- Click on the word Tools on the menu bar at the top of the screen
- Click on the word Conditions
- Click on the New button on the right side of the Edit Worksheet screen
- Near the bottom of the pop-up box click on the down arrow under the column called Item
- Choose which field contains the data that you want to filter your report on
  - The list of fields starts with the Table name then the date item field name separated with period. The field names are listed alphabetically
- In the Condition column click the drop down arrow to pick from the list of operators
  - = means equal to (exactly match)
  - <> means not equal to (will not print out records with the value you specify)
  - > greater than (good for dates ie give me all assignments greater than)
  - < less than (good for dates)
  - <= means less than or equal to
  - >= means greater than or equal to

 ${\bf Like}$  – Allows the use of wildcards for example - Like 'D%' on occupant name would bring back all occupants who name begins with D

**In** – Allows you to use more than one value - In 'US Army','US Air Force' on branch of service would bring back both occupants in the Army and Air Force but not the Navy etc.

**Is Null** – means where the field is empty (this will give you all records where the field you specify has nothing in it)

**Is Not Null** – means where the field is not empty (this will give you all records where the field you specify has data in it)

**Not In** - Allows you to use more than one value – Not In 'US Army','US Air Force' on branch of service would not bring back occupants in the Army and Air Force but would bring back Navy, Coast Guard etc.

**Between** – Returns data between two values (good for dates)

Not Between – Returns data that is outside of the two values (good for dates)

Not Like – The item must not match the value, allows the use of wildcards, Not

Like 'D%' on occupant name would bring back all occupants who did not begin with D

!= - Same as <> above not equal to

#### • In the Value field type in with the keyboard the value that you need

- For example to get all the occupants in the Army
   MFH Units.Branch of Service = Army, where Army is the value you type
- o To get all the occupants who are not Army

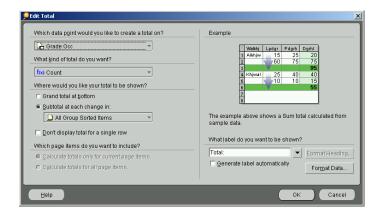
- o MFH Units.Branch of Service <> Army, where Army is the value you type
- Uncheck the Match Case block
  - o This is so it does not matter how you type the text upper or lower case
- Click on OK
- A Funnel Icon will appear on the conditions screen with a check mark in the box to the left of the icon.
- Click on OK again

#### **Totals**

This function is mainly used to count the number of records though you can also use it to add up data for example the total number of dependents

#### **To Count The Number Of Records**

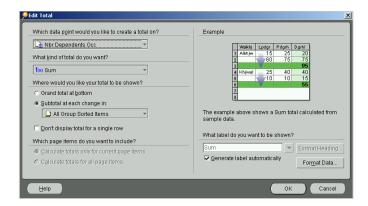
- Click on Tools on the menu bar at the top of the screen
- Click on Totals
- Click on the New button on the right side of the pop-up box
- At the top of the pop-up box click on the down arrow on the first field under the words "Which data point would you like to create a total on?"
- Choose the Count operator
- Below the Count operator is an area with the words "Where would you like your total to be shown?" Below the words are two radio buttons with the words "Grand total at bottom" and "Subtotal at each change in:" underneath this set of words is a drop down allowing you to provide subtotals. You can choose the default "All Group Sorted Items" or any of the fields used in the report.



- Click OK
- Click OK again

#### To Sum a Column

- Click on Tools on the menu bar at the top of the screen
- Click on Totals
- Click on the New button on the right side of the pop-up box
- At the top of the pop-up box on the down arrow on the first field under the words "Which data point would you like to create a total on?" Choose the Sum operator
- In the second field you must choose what you want a sum of
  - o This can only be performed on a number field
  - o Usually used for the number of dependents



- Click OK
- Click OK again

#### Exporting to Excel and Attaching to an E-mail

This is performed primarily when you want to e-mail the data to an individual not in Housing or who does not have access to run Oracle Discoverer 4i reports on the Housing Database.

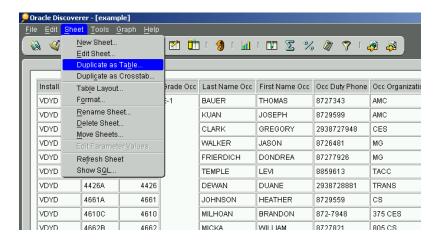
Once the report is exported to Excel it is static, it will be historical and you will have to run the Discoverer Report and export to Excel again to get updated data.

- Click on the top menu File Export on the tool bar at the top of the screen
- The Export Wizard options screen will appear. This will allow you to:
  - o Export a single or multiple worksheet
  - o Click on next to continue
  - On Step 2 of the Export Wizard, Choose the format you want to export with by clicking on the dropdown Choose MS Excel (\*.xls)
  - o In the center of the Wizard screen, there is a prompt that asks where you want to save the file. Click on the Browse button to choose where you wish to save the file. Click on save.
  - Click on next to continue
  - o On Step 3 of the Export Wizard, choose "Supervised" and click "Finish". The Export Log will appear, and display the file that exported.
- Locate the exported file. Double click to open in Excel.
  - Note: A macro warning message may appear when opening the file. If
    macro security is set too high, you will need to change the Macro security
    level by clicking on Tools|Macro|Security on the top menu bar in Excel.
    Click on Medium security and OK.
  - O You can then open the file via the menu bar or double click the file icon
  - o A macro warning prompt will appear. Click on the "Disable Macros" button to continue. The file will now display.
- Click on Save As
- Choose a location to save your report and give it a name
  - o Suggest you add the date to the name
- Close MS Excel
- Enter into your MS Outlook mail inbox
- Click on the New button to create a new e-mail to send
- Address and type your e-mail as normal
- Click on the word Insert on the menu at the top of the screen
- Click on the word File
  - o Or you can click on the Paper Clip on the menu bar
- Locate the File you created above
- Double click on it or click once and then click on the Insert button
- Send the e-mail as normal

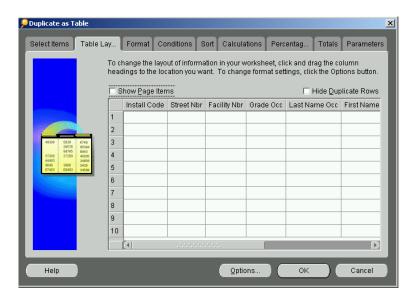
### Duplicating a Sheet (Report)

This can be done when you have a format for a report but want to specify a different condition or sort. This means that you do not have to recreate the report. You can have more than one report sheet in a Discoverer workbook, there will be multiple tabs at the bottom of the screen, much like MS Excel.

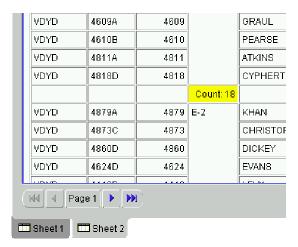
- Click on the word Sheet on the menu bar at the top if the screen
- Click on Duplicate as a Table



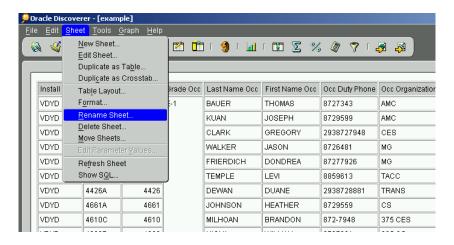
• A Duplicate as Table screen will pop up. This allows you to make changes to the duplicate sheet (formatting, conditions, etc...)



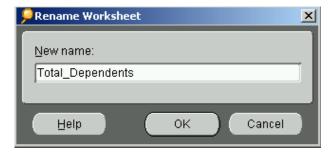
- Click on the OK button at the bottom right center button of the screen
- Look at the bottom of your work book you will now have two tab one for each sheet



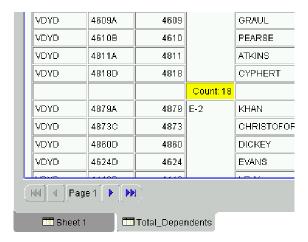
• To rename the sheets so that they have more meaning click on the word Sheet on the menu bar at the top of the screen



Click on Rename Sheet



- Type in what you want to call this sheet
- Click the OK button



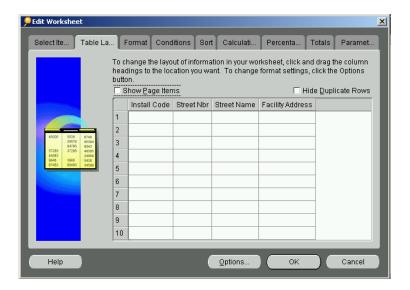
#### • Click on the other tab(s) and rename as above

You can now make the modifications you need to the sheet you copied

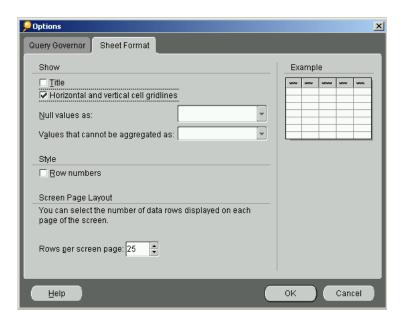
### Formatting for Printing

As the reports are web based (HTML), Discoverer 4i offers primitive print control. Page printing controls/formatting are accessed from the menu bar or the printer icon on the toolbar. The entire report will be printed, without page orientation controls (Landscape/Portrait). Page formatting functions must be accomplished prior to printing,

using **Sheet**|**Format** from the menu bar or the Table Layout Icon on the tool bar. an Edit Worksheet window will popup



You can show or hide report gridlines by clicking on the Options button and clicking on the Horizontal and vertical cell gridlines box.

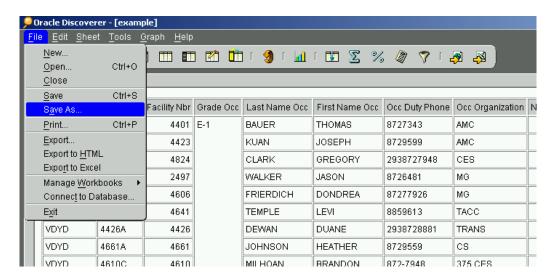


- Click in the box next to Row Numbers to remove the Check Mark
- The number of rows displayed can also be changed in this screen
- Click on the OK button

# Saving the Report for the First Time

Once you have created your report it can be saved on the database server, either at Gunter, Ramstein or Pearl Harbor. This allows you to share the report with other people at the office.

- Click on the word File on the menu bar at the top of the screen
- Click on Save As
- Enter the name of the report that will be saved at the database
- Click on the Save button



### Opening an Existing Report

Each time you run the report the database is re-queried and you get the most current data. (If you want to keep historical data you must print out the reports or export to Excel and save)

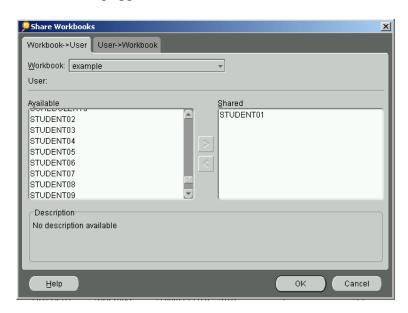
- Open Internet Explorer
- Go to the CONUS, PACAF or USAFE link
- Click on "Discoverer Links"
- Click on "Discoverer 4i Plus Server (ACES-HM/PR/RP)
- Move Cursor to "Click to Start" button. Click on link.
  - o It may take a minute for the Discoverer Login screen to appear
- Enter your ACES-HM logon, password and database as the connect string
- Click Connect button
  - o It can take some time to log into Discoverer
- Click on the Database button
- Choose workbook to open
- Click on the file and click on open
- If someone else created this report you may be asked to confirm that you want to run the report with your current logon
- When prompted click on Yes to run the query for the sheet

### Sharing a Workbook/Report

You can share workbooks with other users at your installation two ways: Share one workbook with multiple users or share multiple workbooks with one other user. This allows one person to create a workbook, but then anyone can run it.

#### • To share one workbook with several other people:

o From the menu, choose File | Manage Workbooks | Sharing. The Share Workbooks dialog appears.



#### Click the Workbook -> User tab

Choose the name of the workbook that you want to share from the workbook drop-down list.

In the list of Available Users, click the name of a person with whom you want to share the workbook.

Click to add. The person's name appears in the Shared list. The names in the Shared list are the people who can have access to the workbook.

Repeat for all the people with whom you want to share the workbook.

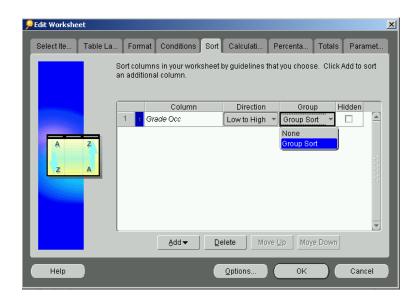
Click OK.

### **Group Sorting**

Is formatting that suppresses duplicate values for an item For example, if you group sort an item called Branch of Service, occupant information can appear grouped under such headings as US Air Force, US Army, US Navy etc. It you want a report with sub-totals it is a good idea to group sort first.

The item that you are going to be group sorting on should usually be your first column, to make the report format look neater. You must carefully think how you want the report to look and what you want to group sort on. Branch of Service, Rank, Dorm Building Number, Organization are all good examples of what a group sort could be used for.

- Click on the word Tools on the menu bar
- Click on Sort
  - o If your report is already sorted, bypass this step
- Click on the Add button at the bottom of the pop-up box
- Choose the field you want the report to sort on first
- Click on the down arrow in the Group column for the date field item that you want to group sort on

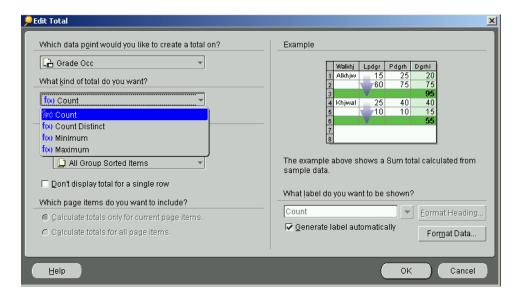


• Click on Group Sort

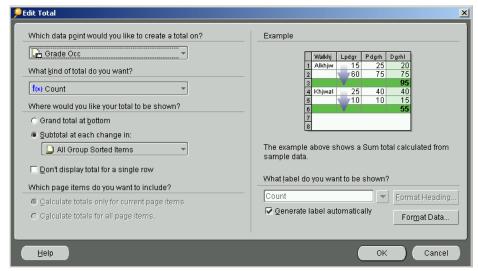
#### **Sub-Totals**

Subtotals calculate a subtotal for each category of data item, usually that you have performed a group sort on and displays that subtotal as new row at the bottom of each category. For example you can use this to count the number of occupants in each of the Branches of Service or an Organization.

- Click on Tools on the menu bar at the top of the screen
- Click on Totals
- Click on the New button on the right side of the pop-up box
- At the top of the pop-up box click on the down arrow on the first field under "Which data point would you like to create a total on?"
  - o If you want number of occupants then you need to choose either last name or SSN
  - o For the number of buildings choose Facility number
  - o For the number of units in MFH choose the Street Number For Dorm rooms choose Rooms
- Click on the down arrow of the second field named "What kind of total do you want?"
- Choose the Count operator

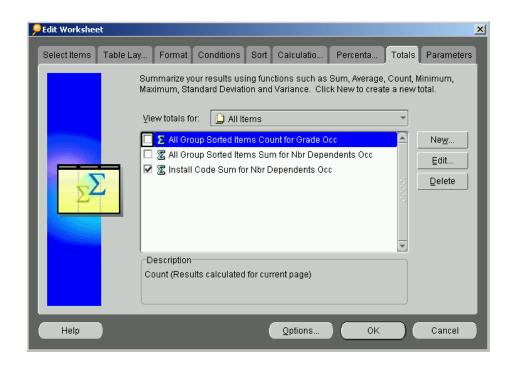


- Choose "Subtotal at each change in"
- Choose "All group sorted items"



- Click on the OK Button
- Click OK again

<u>Note:</u> You can subtotal in any other field that is applicable for your report. (i.e. Group sort by Installation Code, Count Number of Dependents)

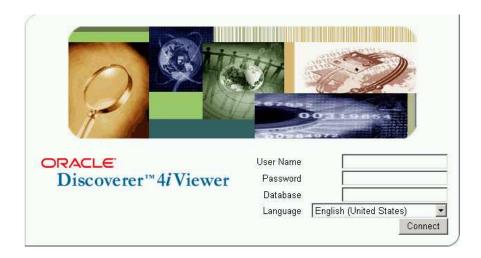


Install Code	Street Nbr	Facility Nbr	Grade Occ	Last Name Occ	First Name Occ	Occ Duty Phone	Occ Organization	Nbr Dependents Occ
VDYD	4626D	4626	E-2	ESTRELLA	JETTE	2938726776	CSS	2
VDYD	4822D	4822		CARTWRIGHT	AARON	8725388	oss	1
VDYD	4470A	4470		LONG	TOMMY	8725388	oss	1
VDYD	4822B	4822		KILLIAN	RYAN	8721885	CS	1
VDYD	4624A	4624		CARSON	FRANKLIN	8725788	ows	1
VDYD	4890C	4890		REDENIUS	WILLIAM	2938727528	SUP	1
VDYD	2461A	2461		TROUP	CASSANDRA	2938726197	MG	1
VDYD	4805B	4805		MORRISON	DEBORAH	8726363	375 MDOS	1
VDYD	4407C	4407		JACKSON	JEREMY	872-9598	AMC 805 CSS	1
VDYD	4421C	4421		MANN	SHAWN	872-1888	375 CS	1
VDYD	4630C	4630		STEBBINS	KARLA	8721888	375 CS	1
VDYD	4606A	4606		WHITE	JASON	872-7578	375 CES	1
VDYD	4430B	4430		CARR	DANIEL	8727578	375 CES	1
VDYD	4665B	4665		EHLERS	KASHA	2938726484 D-4254	MG	2
								Sum: 25
VDYD	4810D	4810	E-3	COOMBS	NESHANTA	8721124	AES	1
VDYD	2403A	2403		CONNERTY	SEAN	2938853923	AMC	1
VDYD	4680A	4680		PUGH	TONYELL	2938854996	AMC	1
VDYD	4422A	4422		FOX CREEK	REBECA	8856516	AMC	1

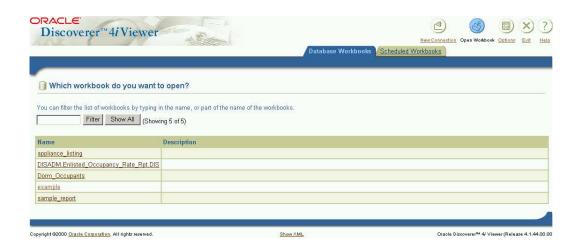
### Using Oracle Discoverer 4i Viewer

The viewer utility provides the capability of sharing reports with others that can be run on demand, allowing read-only access to current reports you wish to share. This enables outside organizations access to a particular report that shows current information, as long as they are granted a read only logon of ACES-HM

- Open Internet Explorer
- Go to CONUS, PACAF, or USAFE server. A login screen will appear



- Enter your User Name, Password and Database (using the tab key or mouse to move between the fields)
- Click on the "Connect" button to continue
- After successfully logging in, an open workbook screen will appear. This will list the reports created with your logon or those that have been shared to you by another user



- Select the report to run by clicking once on the report name
- A query screen will appear to show the working status and then will display the report





• The report will display 25 lines of data by default.

- Select the report to run by clicking once on the report name
- A query screen will appear to show the working status and then will display the report



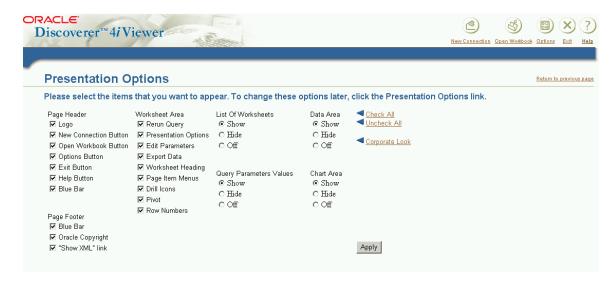


• The report will display 25 lines of data by default.

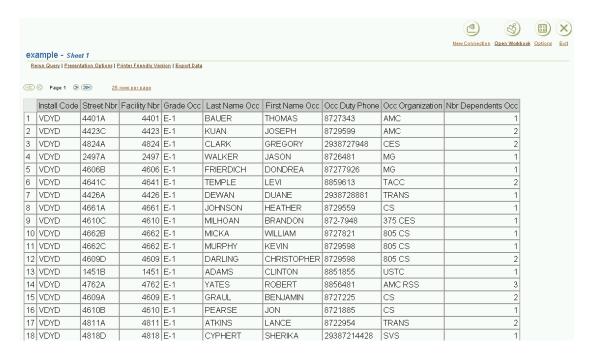
### Screen Navigation and Layout Options

There are several options for the viewer that will control the screen layout and number of records that are displayed on the screen at one time.

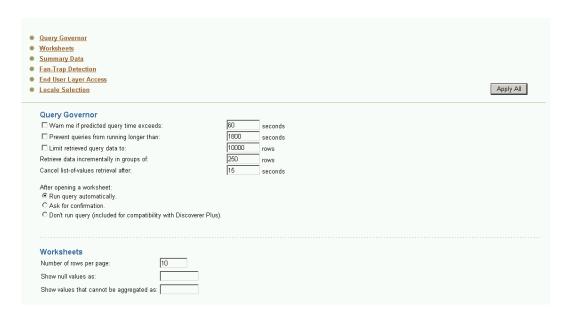
- To get a cleaner view of the report, click on the Presentation Options link
- Click on "Corporate Look" and click on the "Options Button" checkbox
- Click on apply. Note: this will lock the number of records displayed. To reverse, go into Presentation Options and check the Options Button.



• Here is the initial result:



• Click on the "25 rows per page" link, located to the right of the page navigation arrows. The "Options" page will appear. Scroll down to the Worksheets section of the page.



- In the Worksheets section of the form, change "Number of rows per page" from 25 to 10. Click on "Apply All" Button.
- If the new screen doesn't re-display, click on "Rerun Query" hyperlink located under the report name.



The result is a cleaner screen, with data that is easy to read

# Printing

As the reports are web based (HTML), Discoverer 4i view offers primitive print control. By clicking on the "Printer Friendly Version" link, a continuous HTML table will be displayed, and can print this by using the web browser "Print" icon. Here is what the printout will look like on the screen:

Install Code	Street Nbr	Facility Nbr	Grade Occ	Last Name Occ	First Name Occ	Occ Duty Phone	Occ Organization	Nbr Dependents Occ
VDYD	4401A	4401	E-1	BAUER	THOMAS	8727343	AMC	1
VDYD	4423C	4423		KUAN	JOSEPH	8729599	AMC	2
VDYD	4824A	4824		CLARK	GREGORY	2938727948	CES	2
VDYD	2497A	2497		WALKER	JASON	8726481	MG	1
VDYD	4606B	4606		FRIERDICH	DONDREA	87277926	MG	1
VDYD	4641C	4641		TEMPLE	LEVI	8859613	TACC	2
VDYD	4426A	4426		DEWAN	DUANE	2938728881	TRANS	1
VDYD	4661A	4661		JOHNSON	HEATHER	8729559	cs	1
VDYD	4610C	4610		MILHOAN	BRANDON	872-7948	375 CES	1
VDYD	4662B	4662		MICKA	WILLIAM	8727821	805 CS	1
VDYD	4662C	4662		MURPHY	KEVIN	8729598	805 CS	1
VDYD	4609D	4609		DARLING	CHRISTOPHER	8729598	805 CS	2
VDYD	1451B	1451		ADAMS	CLINTON	8851855	USTC	1
VDYD	4762A	4762		YATES	ROBERT	8856481	AMC RSS	3
VDYD	4609A	4609		GRAUL	BENJAMIN	8727225	cs	2
VDYD	4610B	4610		PEARSE	JON	8721885	cs	1
VDYD	4811A	4811		ATKINS	LANCE	8722954	TRANS	2
VDYD	4818D	4818		CYPHERT	SHERIKA	29387214428	SVS	1
			Count: 18		i			Sum: 26
VDYD	4879A	4879	E-2	KHAN	AMY	2938728878	AMC	2
	·		i		la compression	Lagrage	10.40	

#### • Here is a sample page printout:

Install Code	Street Nbr	Facility N br	Grade Occ	Last Name Occ	First Name Occ	Occ Duty Phone	Occ Organization	Nbr Dependents Occ
VDYD	4401A	4401	E-1	BAUER	THOMAS	8727343	AMC	1
VDYD	4423C	4423		KUAN	JOSEPH	8729599	AMC	2
VDYD	4824A	4824		CLARK	GREGORY	2938727948	CES	2
VDYD	2497A	2497		WALKER	JASON	8726481	MG	1
VDYD	4606B	4606		FRIERDICH	DONDREA	87277926	MG	1
VDYD	4641C	4641		TEMPLE	LEVI	8859613	TACIC	2
VDYD	4426A	4426		DEWAN	DUANE	2938728881	TRANS	1
VDYD	4661A	4661		JOHNSON	HEATHER	8729559	cs	1
VDYD	4610C	4610		MILHOAN	BRAND ON	872-7948	375 CES	1
VDYD	4662B	4662		MICKA	WILLIAM	8727821	805 CS	1
VDYD	4662C	4662		MURPHY	KEVIN	8729598	805 CS	1
VDYD	4609D	4609	1	DARLING	CHRISTOPHER	8729598	805 CS	2
VDYD	1451B	1451	1	ADAMS	CUNTON	8851855	USTC	1
VDYD	4762A	4762		YATES	ROBERT	8856481	AMC RSS	3
VDYD	4609A	4609		GRAUL	BENJAMIN	8727225	cs	2
VDYD	4610B	4610		PEARSE	JON	8721885	cs	1
VDYD	4811A	4811		ATKINS	LANCE	8722954	TRANS	2
VDYD	4818D	4818		CYPHERT	SHERIKA	29387214428	svs	1
			Count: 18					Sum: 26
VDYD	4879A	4879	E-2	KHAN	AMY	2938728878	AMC	2
VDYD	4873C	4873		CHRISTOFORO	MATTHEW	8858938	AMC	1
VDYD	4860D	4860		DICKEY	CHRISTINA	8726439	MG	3
VDYD	4624D	4624		EVANS	CLAUDETTE	2938726753	ме	1
VDYD	4446D	4446		LEVY	ANTHONY	8727948	375 CES	1
VDYD	4413C	4413		CONNER	TYLER	8729892	CPTS	1
VDYD	4626D	4626		ESTRELLA	JETTE	2938726776	CSS	2
VDYD	4822D	4822		CARTWRIGHT	AARON	8725388	oss	1
VDYD	4470A	4470		LONG	TOMMY	8725388	oss	1
VDYD	4822B	4822		MLUAN	RYAN	8721885	cs	1

### **Exporting Data to Excel**

Reports can be exported in several different formats from viewer. A good example would be to utilize the filtering capabilities in Excel to allow for a quick on-screen search. Note: Reports will need to be rerun and exported whenever there is a change to the data. Otherwise the data in Excel is old.

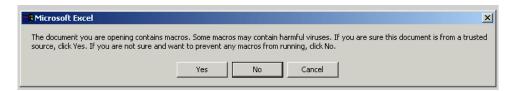
• Click on "Export Data" link located to the right of the "Printer Friendly Version" link on screen



• Click on "Export Data" Button

example - Sheet 1	
Return to previous page	
What export format do you want?	
Microsoft Excel Workbook (*.xls)	$\blacksquare$
Export Data	

• Another web browser window will popup and will display a warning message that the document contains macros. Press "Yes" to continue



• The Excel spreadsheet will display in the new browser window. To save the spreadsheet to your computer, click on the File|Save As... Options located on the top menu bar. The "Save As" window will appear, allowing you to save the file where you wish.